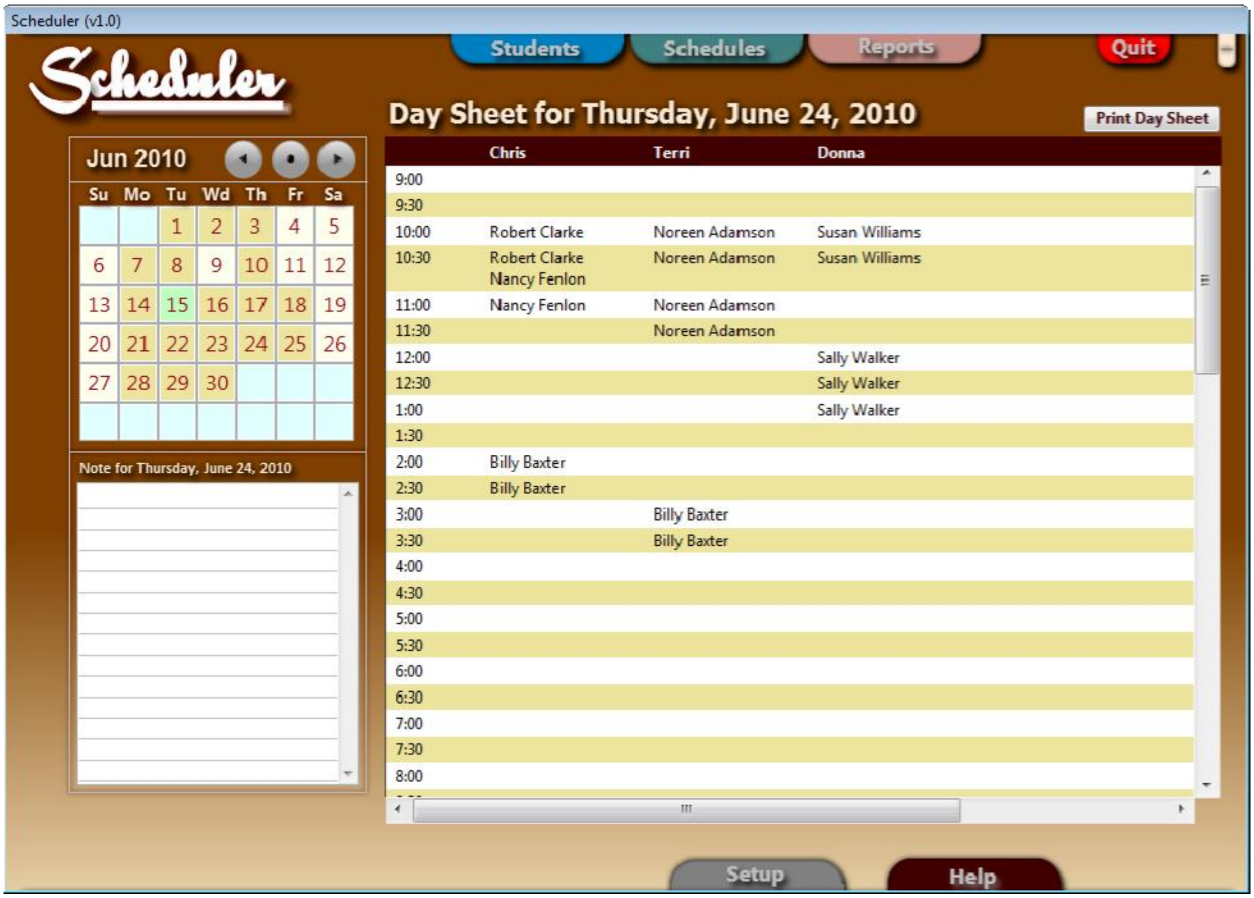
Scheduler is a Windows application designed for a private tutor to keep track of his/her student's classes. It can certainly be used in other areas for scheduling meetings of any kind but its primary focus is for scheduling classes for a single tutor or for a small business with several tutors. It even produces statements and receipts to help with your billing.



Once you become familiar with Scheduler's basic building blocks – students, schedules, sessions and payments – you will find it quite easy to navigate through the application. It is sure to become one of those "How did I ever manage without …" programs that you will depend on to organize your tutoring business.

Read through the rest of these notes and use the sample data to experiment with the various features as they are introduced. In significantly less than a single hour you will be ready to start with your own data. You can then follow the simple steps in the "How Do I Get Started?" section (page 24) and you will be on your way.

If you have any questions, comments, problems or requests be sure to send a note to scheduler@ecion.ca.

Starting Scheduler

After installation, just double-click the program's shortcut button from your desktop and the opening *Scheduler* logo will appear. For "fun", you can drag the logo around the screen (I'm easily amused) and then click the long bar at the bottom of the logo to get to work!

Main Scheduler Screen

The opening screen shows all of the sessions that have been scheduled for each day. There are only three component parts and they are all easy to manage.

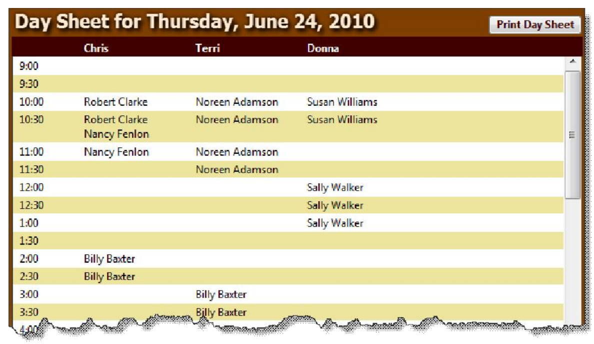
■ Calendar

Using the calendar is probably intuitive. The round buttons near the top are used to change the month displayed in the calendar. The left arrow button changes to the previous month and the right-arrow button changes to the next month. The middle button displaying a dot return to the current day in the current month.

In the calendar grid, any day shaded in light brown is a day on which at lest one session has been scheduled. The current day is shaded in green.

Clicking on a day in the calendar grid displays the Day Sheet for that day showing all of the sessions, their times and instructors.

■ Day Sheet



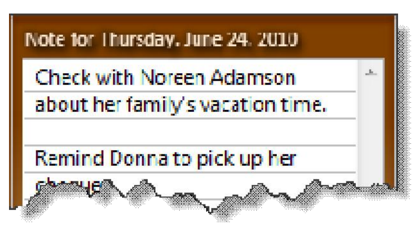
The Day Sheet shows all sessions that have been scheduled for the selected day. There is a column for each instructor involved and a student's name appears in every time slot scheduled with the instructor. At this time, up to six instructors can be displayed on a single day.

Notice the example at 10:30 pm which shows a double booking – Chris has both Robert Clarke and Nancy Fenlon booked in the same half hour.

Click the **Print Time Sheet** button to immediately send the day sheet to your default printer.

The day sheet shown here has 30 minute time slots from 9 in the morning until 9 at night but these settings can be changed in the Setup & Maintenance Panel (page 16).

■ Day Notes



The Day Notes area beneath the calendar is available if you want to keep track of some information relevant to a specific day. Click the day in the calendar, type the note in the note area and you're done; notes are automatically saved.

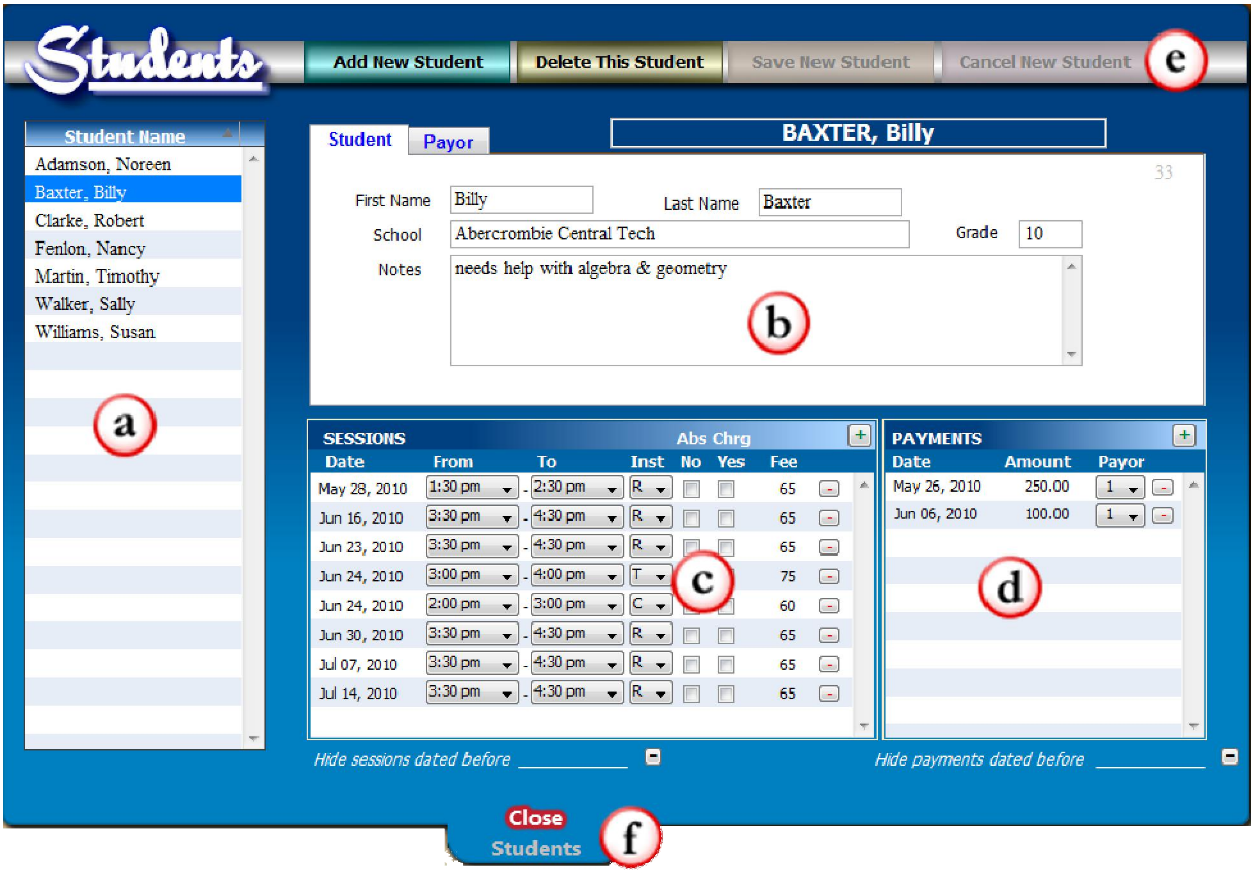
■ Panels

The remaining screens, called "panels", are opened by clicking on the tabs shown along the top and bottom edges of the main Scheduler screen. The details of each panel are described in the rest of this guide.

- Students Panel – for adding/deleting student information.
- Sessions Panel – for scheduling a series of tutoring sessions for students.
- Reports Panel – for creating payor statements and various other reports.
- Setup Panel – for setting Scheduler options and maintaining the database.
- Help Panel – an online view of this user guide.

There are also two tabs in the top-right corner to minimize the window and to quit.

STUDENTS PANEL



(a) Student Names -- a list of the student names in alphabetical order by surname.

(b) Student Information – information about the selected student and the person(s) paying for the student's tutoring sessions.

(c) Sessions List – some details about each tutoring session that has been scheduled for the selected student are listed here in increasing order of session date.

(d) Payments List – details about each payment made for the selected student are listed here in increasing order of payment date.

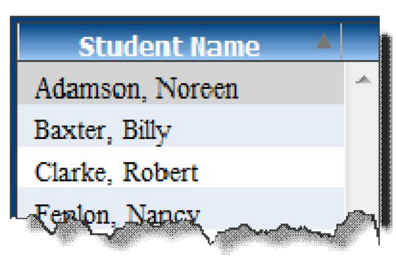
(e) Students Toolbar – the buttons in the Student's toolbar become active (or inactive) depending on which procedure is being carried out.

(f) Close – when finished working in the Student Panel, click the **Close** button to close the panel.

■ STUDENT NAMES

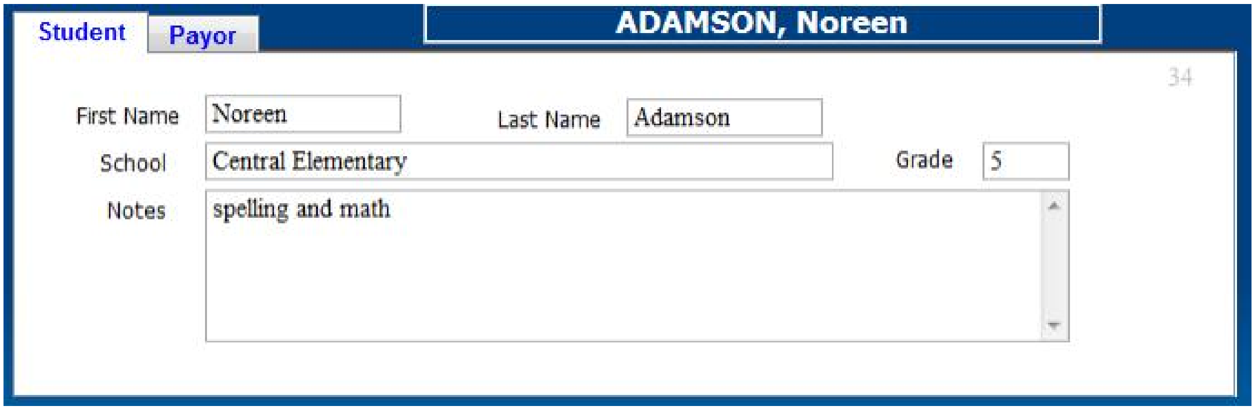
As new students are added to Scheduler, the names of the students will appear in this list in alphabetical order by surname.

Selecting a student by clicking on his/her name fills the rest of the areas of this panel with information about the selected student.

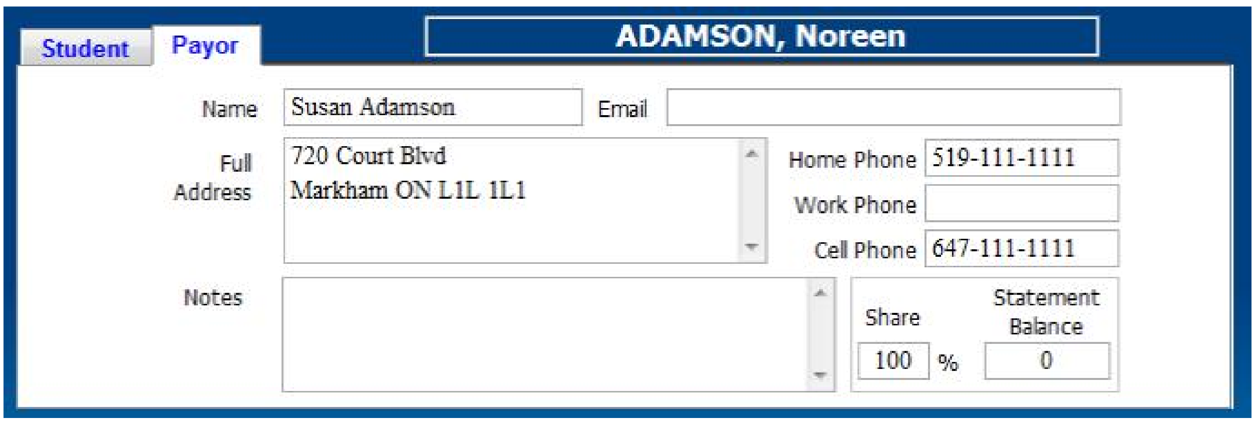


■ Student Information

Use the student information area to enter data about the selected student and the person(s) paying for the tutoring sessions.



The **Student** tab holds some basic information about the student and the subject areas requiring help.



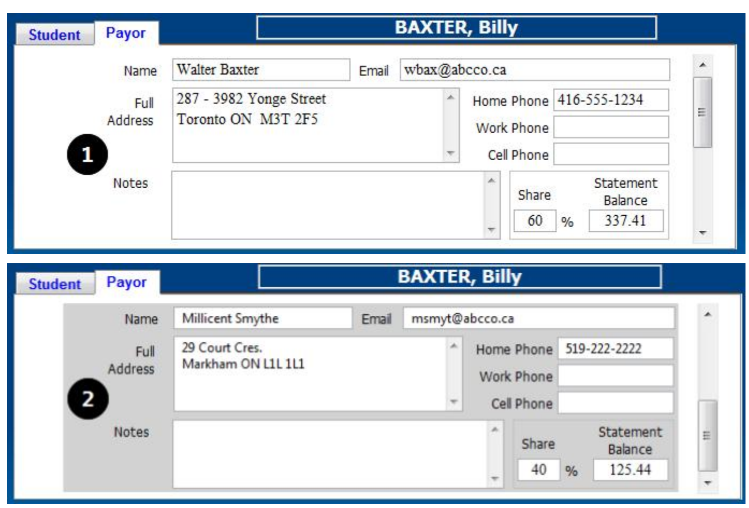
The **Payor** tab is for information about the person paying the tutoring fees. The **Statement Balance** field is automatically filled in when statements (invoices) are generated. But it can be manually modified if you need to make an adjustment to the payor's outstanding balance.

Also note the **Share** field – in most cases there is a single payor but it is also possible (at least in my original client's case) that the fees will be split between two parents. To do this, simply change the **Share** field to reflect the percentage the first payor will pay. This will enable a second payor screen in which to enter the second person's information.

As an example of this situation, take a look at Billy Baxter's payors.

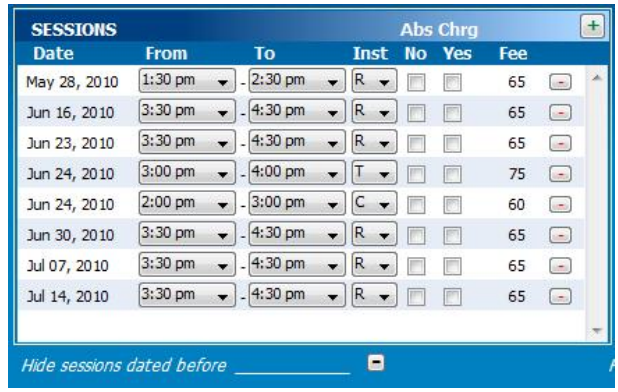
You will see that payor is Walter Baxter who will cover 60% of the fees and payor 2 is Millicent Smythe who will cover the remaining 40%.

The scroll bar is used to scroll between the two payors.



■ SESSIONS LIST

The Sessions List shows every session that has been scheduled with the selected student in chronological order. Each row shows the date, times, instructor and fee for the session.



This is a good area in which to make changes to individual sessions. Making changes for a large block of session is more easily done in the Schedules Panel (page 7) but for an individual session:

- Change the date for a session by double-clicking the date and choosing a new date from the popup calendar.
- Change session times by choosing the new **From** and **To** times from the selection buttons. If changing to an earlier time in the day, first set the "From" time and then the "To" time. Conversely, if changing to a later time in the day, first set the "To" time and then the "From" time. Otherwise you could get an error message if the start time becomes earlier than the end time.
- Change an instructor by choosing a new one from the **Inst** selection button.
- Changing an instructor or the time period can also change the fee for the session but fees can also be modified just by clicking on the relevant fee, typing in a new value and pressing **Enter.**

The **Abs Chrg** column ("Absent Charge") is for dealing with sessions where the student is absent. Will there be a charge for the absent session or not? If there will be no charge, click the box in the **No** column and the Fee will be set to zero. If there will be a charge, click the box in the **Yes** column and adjust the fee if necessary.

The red minus button at the end of a session can be clicked to delete the entire session. Generally this should only be done if the session was a mistake. If the student was absent, it is better to click one of the **Abs Chrg** buttons to keep track of the number of sessions missed.

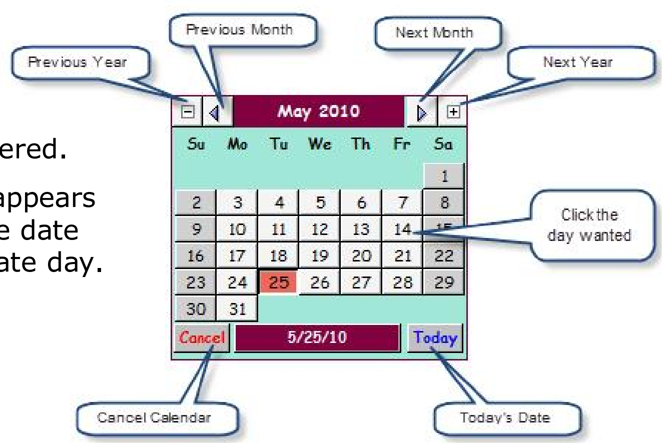
The green plus button in the top-right corner of the Sessions List can be clicked to add a new session for the student. Again, adding a block of sessions is more easily done in the Schedules Panel (page 7) but the plus button is handy for adding one or two individual sessions. When the button is clicked, a new session record is added at the top of the list using the current day's date. You can modify the date, times, instructor and fee. The new session will be sorted into the proper date order the next time this student is selected.

Over time, there can be a large number of sessions in the list which can become a bit of problem to have to scroll through them all. That is the purpose of the **Hide sessions dated before** field below the Sessions List. Click in that field and a calendar will pop up. Select a date in the calendar and all sessions dated prior to the selected date will not appear in the list. The records for those sessions still exist but they won't be displayed here. Clicking the small minus sign button beside the date removes the "hide date" so that all sessions again appear.

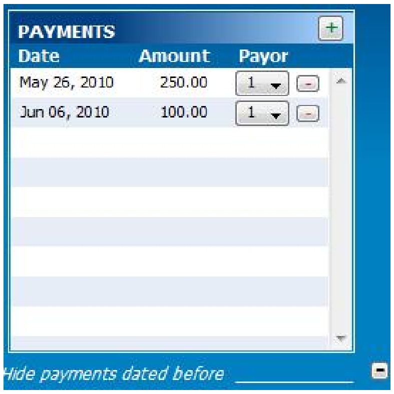
POPUP CALENDAR

There are several places in this program where a date must be entered.

In each case, this popup calendar appears and you simply need to scroll to the date you want and click on the appropriate day.



■ Payments List



The Payments List shows every payment received for the selected student's sessions.

To enter a new payment, click the small green plus sign button at the top of the Payment List. This inserts a new line using the current date (which can be changed). Click in the **Amount** field, enter the payment amount and press **Enter**. In those cases where there are two payors, select the appropriate one in the **Payor** column.

An incorrect payment entry can be deleted by clicking the small red minus sign button beside the payment.

Over time, there could be a large number of payments which can become a bit of problem to have to scroll through them all. That is the purpose of the **Hide payments dated before** field below the Payments List. Click in that field and a calendar will pop up. Select a date in the calendar and all payments dated prior to the selected date will not appear in the list. The records for those payments still exist but they won't be displayed here. Clicking the small minus sign button beside the date removes the "hide date" so that all payments again appear.

■ Students Toolbar

The four buttons in this toolbar are context-related meaning they become active only when it makes sense to do so based on your current activity.

Adding a New Student

To add a new student:

1. Click the **Add New Student** button. This disables all areas of the Student Panel except the tabbed Student Information area.
2. Enter the student and payor information.
3. Click the **Save New Student** button to keep the new information or click the **Cancel New Student** button to discard the record for the new student.
4. Once the student has been saved, you can change and add data at any time and all further changes are automatically saved.
   TIP: What I tend to do is start a new student, enter only his/her name and then immediately save the record. The rest of the information can be entered at any time.

Deleting an Existing Student

You will want to be **very careful** about this procedure since it deletes the student record and all schedule, session and payment records belonging to that student. There is no way to recover this information. *You've been warned!!*

1. Select the student by clicking the name in the Student List.
2. Click the *Delete This Student* button. A confirmation message will appear so that you can still back out by clicking **No** (do not delete). Once you click **Yes** to the confirmation message, all information related to that student is deleted.

■ Close

Click the **Close** button to close the Students Panel. The panel cannot be closed if you are in the process of entering a new student – the new student must be saved or cancelled before the panel can be closed.

SCHEDULES PANEL

Tutoring sessions are not usually set up one by one but rather as a **schedule** of sessions. Each schedule can create several sessions per week over an extended period and is a very efficient means of setting up repetitive sessions. For example, you can easily set up a student's sessions that occur every Monday at 2:00 pm and Friday at 11:00 am throughout April and May. The Schedules panel has these main areas:

(a) Student/Instructor – select the student and instructor for the schedule.

(b) Schedule Dates – the range of dates within which to schedule sessions.

(c) Weekly Sessions – the day, time and fee for each session each week within the date range.

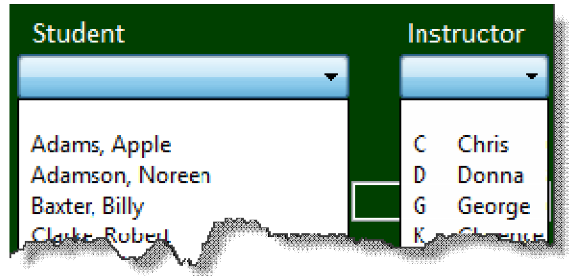
(d) Existing Schedules – to review and perhaps modify a student's existing schedules.

(e) Sessions Toolbar – the buttons in the Schedule's toolbar become active (or inactive) depending on which procedure is being carried out.

(f) Close – when finished working in the Schedules Panel, click the **Close** button to close the panel.

All sessions generated by setting up these schedules are automatically displayed in the corresponding Day Sheets on the main Scheduler screen and in the Sessions List in the Students Panel.

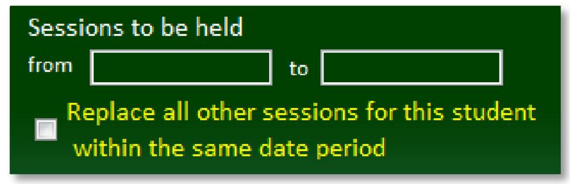
■ Student/Instructor



When adding a new schedule, start by selecting a student and then select an instructor for the sessions being scheduled. The instructor's rate will appear beside the instructor field.

If it becomes necessary later to edit the schedule, the instructor can be changed but not the student (since all sessions and payments are already linked to the original student).

■ Schedule Dates



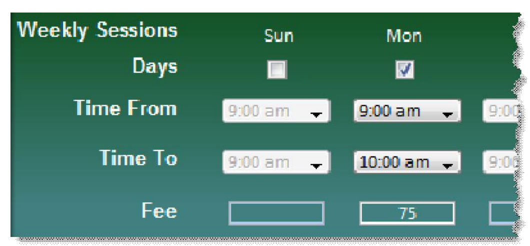
Clicking in each of the date boxes opens a popup calendar to select the range of dates being set for a new schedule.

In general, scheduling sessions is non-destructive. This means you could set up a schedule for Mary for a certain period and then set up another schedule for Mary using the same or an overlapping period and the sessions of both schedules would be in effect – the second schedule does not wipe out the first.

Unless: when setting up the second schedule you turn on the **Replace all other sessions for this student within the same date period** check box. In this case, all sessions within the second schedule's date range are deleted and replaced with the second schedule's sessions.

This gives you the ability to both add new sessions to an existing date period or to wipe out sessions in a period and replace them. Some examples of dealing with several scheduling scenarios are given on page 10.

■ Weekly Sessions

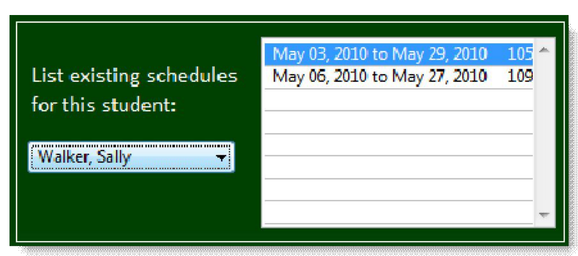


Within the date range specified, the Weekly Sessions area of the panel is where the specific days and times are scheduled. For each day wanted, click the check box for the day and set the starting and ending times.

Fees are automatically calculated based on the length of the session and the instructor's rate but the fee can be manually changed if necessary.

Once this information has been entered, click the **Save Changes** button to implement the schedule or click **Cancel Changes** to discard the schedule.

■ Existing Schedules



To view or modify an existing schedule, select the student's name and a list of his/her schedules appears in chronological order. Select a schedule and its details appear in the panel.

You can then make adjustments *except* to the student name or date range and click the **Save Changes** button to implement the changes or click **Cancel Changes** to discard them. However, changes are not allowed to sessions that are dated prior to the current day's date – those sessions have already happened so cannot be changed.

See page 10 for some different scheduling scenarios to better understand how to use the Existing Schedules area.

■ Sessions Toolbar

The four buttons in this toolbar are context-related meaning they become active only when it makes sense to do so based on your current activity.

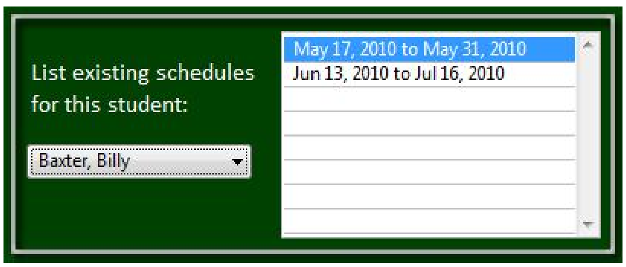
Adding a New Schedule

1. Click the **Add New Schedule** button to enable the various areas of the panel.
2. Select a student from the **Student** dropdown list and an instructor from the **Instructor** dropdown list.
3. Enter dates to specify the range of dates over which this schedule is to be implemented. If you want to erase any existing sessions for this student within the same range of dates, click the **Replace all other sessions** check box so that it is checked.
4. For each day in the week on which a session is to be held, click the day's check box and set the times the session is to begin and end.

5. The session fee is calculated based on the length of the session and the instructor's rate. It can be changed by clicking in the fee box and entering a new fee.
6. When your entries are complete, click the **Save Changes** box button or click **Cancel Changes** to cancel the entire schedule. If the schedule is saved, all of the daily sessions within the date range will be generated and will show up in the appropriate Day Sheets.

Editing an Existing Schedule

1. Select the student's name in the Existing Schedules area of the panel and a list of his/her sessions will be displayed.

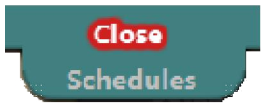


2. Click on the session to be edited and its settings will appear in the panel. Everything can be changed except the student who was selected or the schedule's date range.

   But remember that no changes can be made to sessions that are in the past (i.e., with session dates prior to the current day's date). For example, if you want to modify an existing schedule set from May 1 to July 31 and it is currently June 15, the changes will only affect the sessions from June 15 to July 31.
3. When finished editing, either click **Save Changes** to apply the changes or click **Cancel Changes** to cancel them.

■ Close

Click the **Close** button to close the Schedules Panel.



■ SCHEDULING SCENARIOS

It is August 20 and a student is enrolling for 2 classes a week with George throughout September.

1. In the Schedules panel, add a new schedule for the student, set George as the instructor and set September 1 to September 30 as the period. Then set a Monday session at 2:00pm and a Thursday session at 10:00am. Save the changes.
2. Mistake – the second session was supposed to be for Wednesday, not Thursday. Simply call up the existing schedule, turn off Thursday and set a Wednesday session at 10:00am. Save the changes.

   Note that if you were really asleep at the switch and didn't make this correction until September 8, you would receive a message stating that some of the sessions in the schedule have already passed and cannot be changed. The changes would still apply to dates from September 8 through September 30.

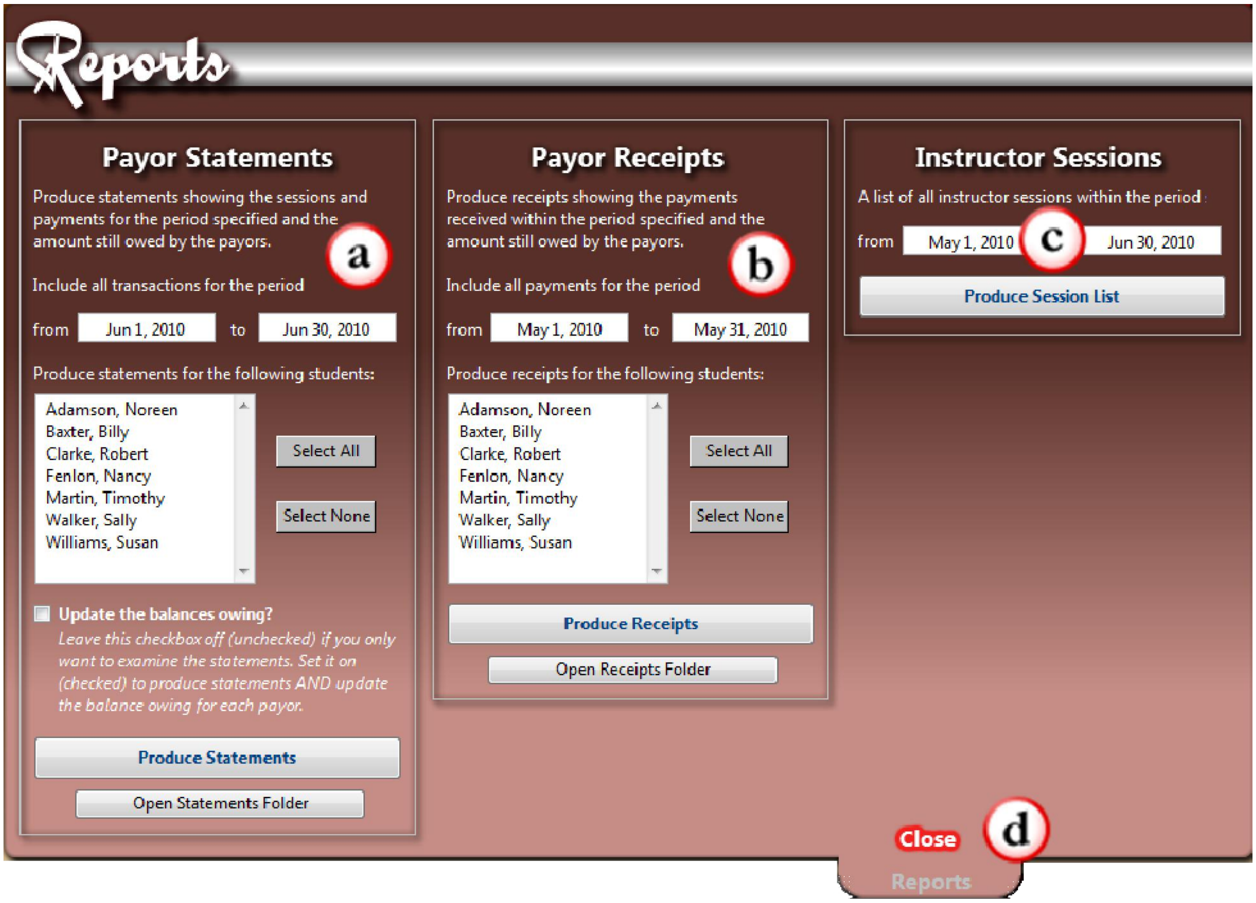
It is now September 10 and the student wants to change the Wednesday sessions to Fridays for the rest of the month. There are two ways to do this:

1. The first possibility is to recall the existing September 1 to September 30 schedule and change the Wednesday session to Friday. As in the "Mistake" scenario above, when you save the changes, you will receive a message that some of the sessions are in the past and cannot be changed. So the sessions from September 1 through September 9 will not be changed (they can't be since they have already happened) but the change will occur for the sessions from September 10 to September 30.
2. The second possibility is to start a brand new schedule for the period from September 10 to September 30. If you just set the Friday session and save the changes, the Friday will be added but the old Wednesday sessions will still remain. This is not what we want in this case but the idea can come in handy when you want to add new sessions without disturbing any existing sessions in a given period.

   The correct method in our example is to re-do the entire week for the September 10 to 30 period. That is, set the Friday session and also set the existing Monday session. Then turn on the **Replace all other sessions for this student within the same time period** checkbox and save changes. This will delete everything for the student within the specified period and then set the Monday and Friday sessions.

Should every change to sessions be handled in the Schedules panel? No. Changes to a single or a very few sessions may be more easily made in the Sessions List of the Students panel. See page 5 for full details on the Sessions List. For example:

1. An instructor is sick for a session: In the Students panel, call up the student, find the specific session in the Sessions list and change the instructor in the drop-down list.
2. A student needs to change the date or time for a session: In the Students panel, call up the student, find the specific session in the Sessions list and change the date and/or time as required.
3. A student is absent for a session: In the Students panel, call up the student, find the specific session in the Sessions list and click one of the check boxes under the **Abs Chrg** – click **No** if you are not going to charge the student for the absence or click **Yes** if you are going to charge (you can change the fee if wanted).
4. A session was set up in error: In the Students panel, call up the student, find the specific session in the Sessions list and click the red minus sign at the end of that row to delete the session. This would mean that the session never existed rather than that it existed but was not completed because of absence.
5. A student wants a special additional session: In the Students panel, call up the student and click the green plus sign button at the top of the Sessions list. Modify the added session for the date, time and instructor as required.



At present, there are only three reports included in Scheduler; more will be added as the need arises.

(a) Payor Statements – invoices for each payor listing the sessions in the given period, payments made, taxes and balance owing.

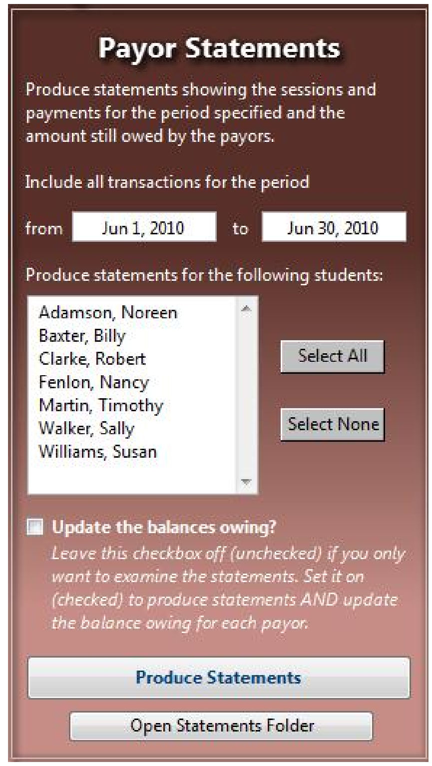
(b) Payor Receipts – receipts for payments made within a given period; some payors may be able to use these for tax purposes.

(c) Instructor Sessions – amounts owing to each instructor for tutoring within a given period.

(d) Close – when finished working in the Reports Panel, click the **Close** button to close the panel.

■ PAYOR STATEMENTS

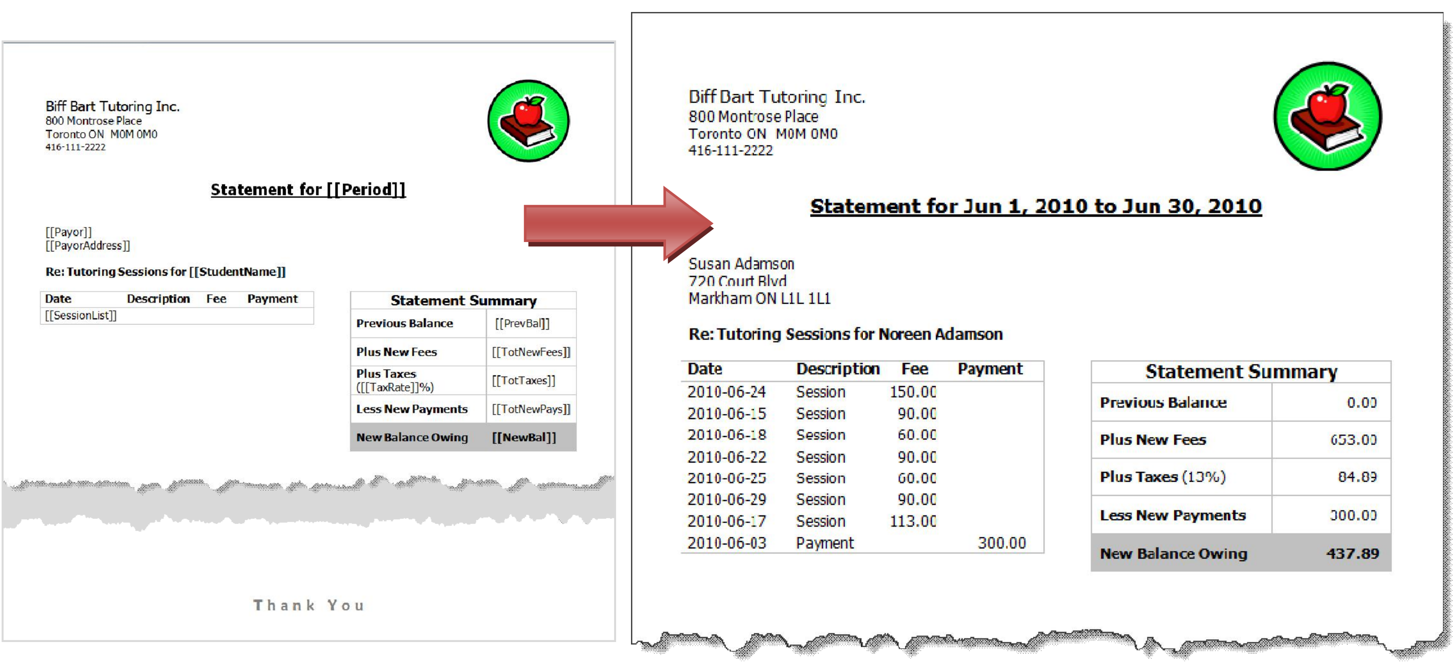
At given periods, you will want to invoice the payors for the tutoring sessions completed within that period. The procedure is quite simple:



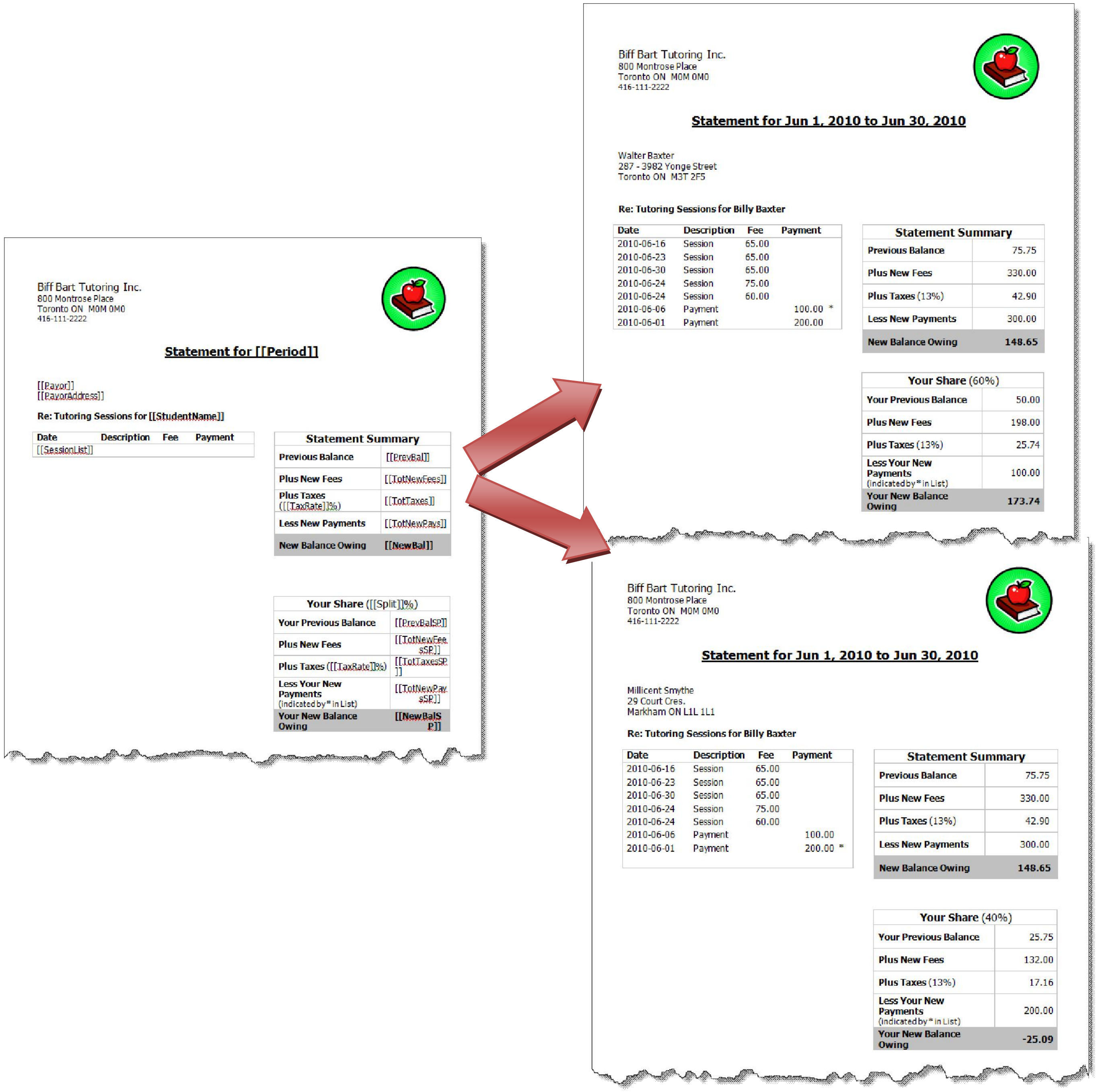
1) Set the date range for the period you wish to cover; probably this will be monthly but any period will work.
2) Select the student or students for whom you require statements – click each student's name in the list or click the **Select All** button to select everyone.
3) If you just want to review the statements, click the **Produce Statements** button.
4) If you have already reviewed the statements and want to update each payor's balance owing, click the **Update the balances** check box to show a check mark and then click the **Produce Statements** button. In this case, the statements will still be produced and the new balance owing for each payor will be updated on the **Payor** tab in the **Students Panel.**
5) To view the statements, click the **Open Statements Folder** button. See the "Folder Organization" note (page 22) for information on how the resulting statements are stored.

STATEMENT LAYOUT

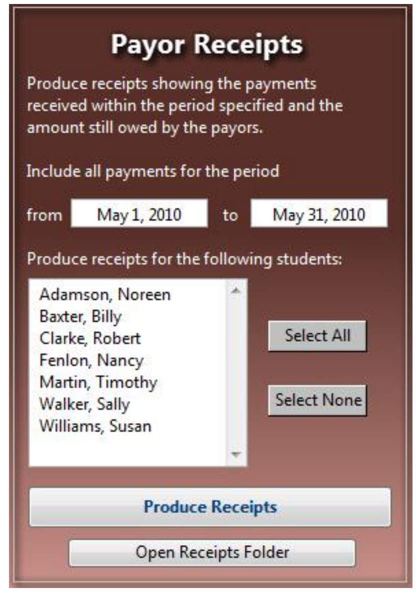
In the **SchedulerData** folder you will find a Word file (RTF format) named **StatementTemplate.rtf.** This document is used to produce the statements. Originally you will want to open it and change the company address section and company logo to your own. You may also want to make a whole bunch of other changes – but restrain yourself!! All of the placeholders you see in double square brackets (e.g., `[[PayorAddress]]`) will be filled in with information from Scheduler and there is not much flexibility for layout in order to make everything fit correctly. If you have problems or special needs, sent a request to scheduler@ecion.ca.



For students that have payments split between two payors, there is a template named **StatementTemplateSplit.rtf** that is automatically used and produces a statement for each payor showing the share for each. Again, you will want to modify the template with your own company information.



■ Payor Receipts

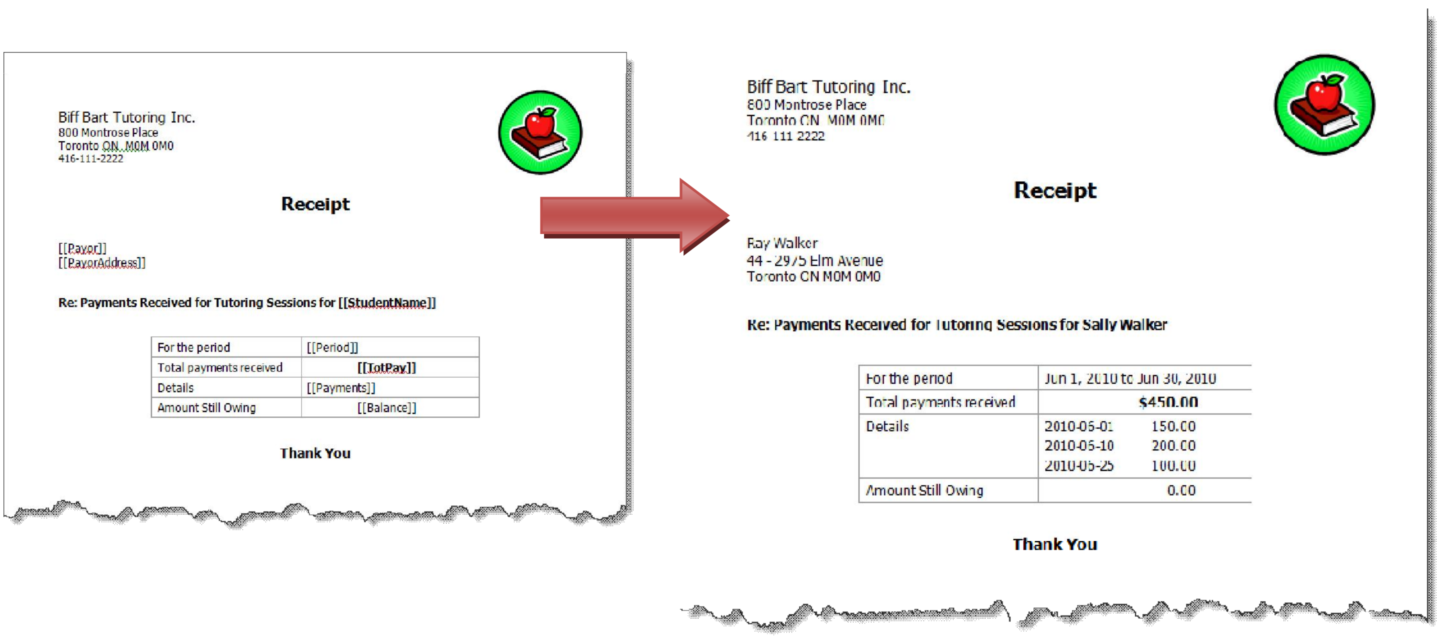


Similarly to the statements, you can also generate receipts listing all payments made in a given period. Many people appreciate having a receipt listing all payments made within a year – this can sometimes be used for tax purposes. The procedure is:

1) Set the date range for the period you wish to cover.
2) Select the student or students for whom you require receipts – click each student's name in the list or click the **Select All** button to select everyone.
3) Click the **Produce Receipts** button to generate a receipt for each payor of the students selected.
4) To view the receipts, click the **Open Receipts Folder** button. See the "Folder Organization" note (page 22) for information on how the resulting receipts are stored.

Receipt Layout

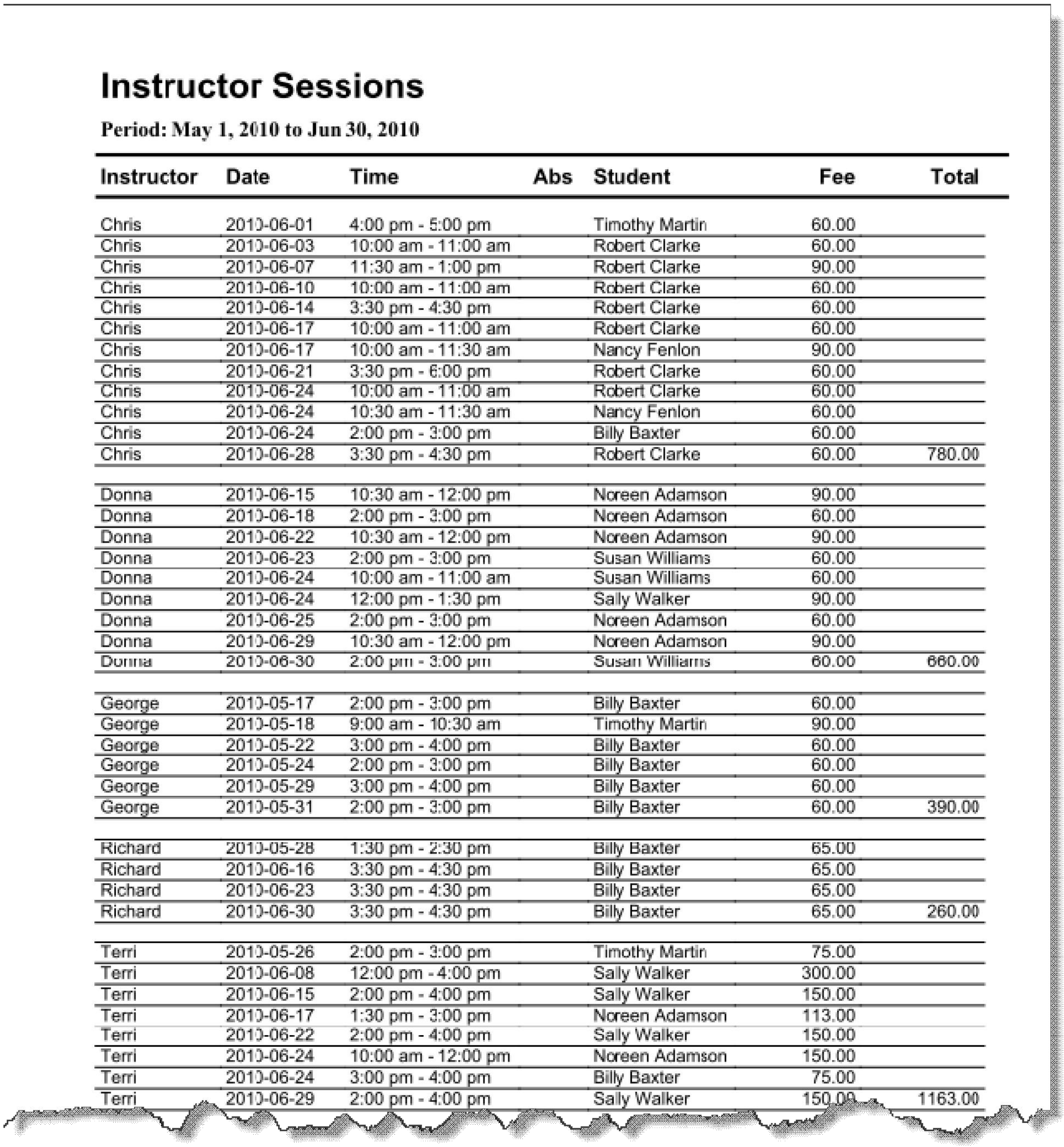
In the **SchedulerData** folder you will find a Word file (RTF format) named **ReceiptTemplate.rtf.** This document is used to produce the receipts. Originally you will want to open it and change the company address section and company logo to your own. You may also want to make a whole bunch of other changes – but restrain yourself!! All of the placeholders you see in double square brackets (e.g., `[[PayorAddress]]`) will be filled in with information from Scheduler and there is not much flexibility for layout in order to make everything fit correctly. If you have problems or special needs, sent a request to scheduler@ecion.ca.



■ Instructor Sessions

This report lists all of the sessions completed within a given period organized by instructor. Simply enter the date range wanted and click the **Produce Session List** button.

The list will be generated and opened as a PDF document. The list shows each instructor, their sessions, fees and the total fee for the period.

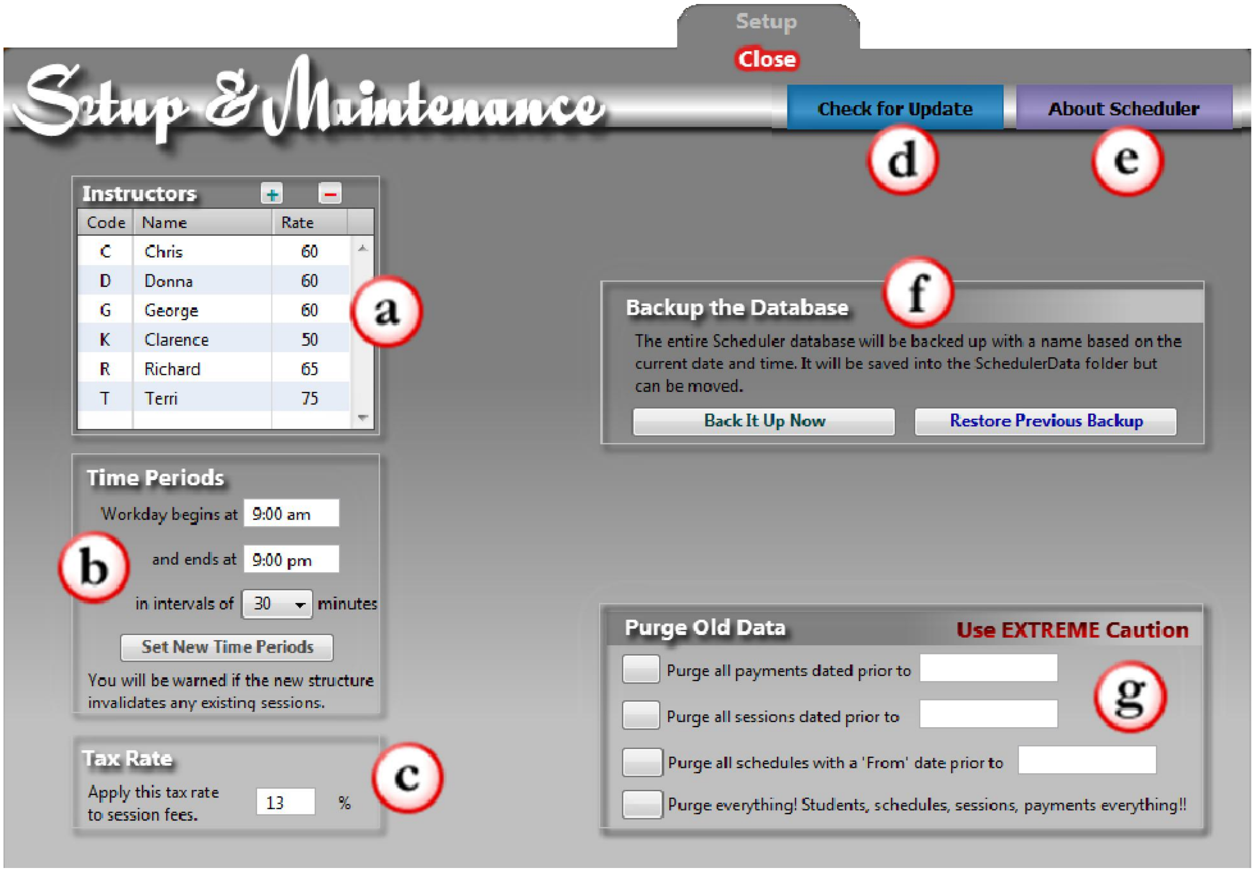


Instructor Sessions

Period: May 1, 2010 to Jun 30, 2010

Instructor	Date	Time	Abs	Student	Fee	Total
Chris	2010-06-01	4:00 pm - 5:00 pm		Timothy Martin	60.00	
Chris	2010-06-03	10:00 am - 11:00 am		Robert Clarke	60.00	
Chris	2010-06-07	11:30 am - 1:00 pm		Robert Clarke	90.00	
Chris	2010-06-10	10:00 am - 11:00 am		Robert Clarke	60.00	
Chris	2010-06-14	3:30 pm - 4:30 pm		Robert Clarke	60.00	
Chris	2010-06-17	10:00 am - 11:00 am		Robert Clarke	60.00	
Chris	2010-06-17	10:00 am - 11:30 am		Nancy Fenlon	90.00	
Chris	2010-06-21	3:30 pm - 6:00 pm		Robert Clarke	60.00	
Chris	2010-06-24	10:00 am - 11:00 am		Robert Clarke	60.00	
Chris	2010-06-24	10:30 am - 11:30 am		Nancy Fenlon	60.00	
Chris	2010-06-24	2:00 pm - 3:00 pm		Billy Baxter	60.00	
Chris	2010-06-28	3:30 pm - 4:30 pm		Robert Clarke	60.00	780.00
Donna	2010-06-15	10:30 am - 12:00 pm		Noreen Adamson	90.00	
Donna	2010-06-18	2:00 pm - 3:00 pm		Noreen Adamson	60.00	
Donna	2010-06-22	10:30 am - 12:00 pm		Noreen Adamson	90.00	
Donna	2010-06-23	2:00 pm - 3:00 pm		Susan Williams	60.00	
Donna	2010-06-24	10:00 am - 11:00 am		Susan Williams	60.00	
Donna	2010-06-24	12:00 pm - 1:30 pm		Sally Walker	90.00	
Donna	2010-06-25	2:00 pm - 3:00 pm		Noreen Adamson	60.00	
Donna	2010-06-29	10:30 am - 12:00 pm		Noreen Adamson	90.00	
Donna	2010-06-30	2:00 pm - 3:00 pm		Susan Williams	60.00	660.00
George	2010-05-17	2:00 pm - 3:00 pm		Billy Baxter	60.00	
George	2010-05-18	9:00 am - 10:30 am		Timothy Martin	90.00	
George	2010-05-22	3:00 pm - 4:00 pm		Billy Baxter	60.00	
George	2010-05-24	2:00 pm - 3:00 pm		Billy Baxter	60.00	
George	2010-05-29	3:00 pm - 4:00 pm		Billy Baxter	60.00	
George	2010-05-31	2:00 pm - 3:00 pm		Billy Baxter	60.00	390.00
Richard	2010-05-28	1:30 pm - 2:30 pm		Billy Baxter	65.00	
Richard	2010-06-16	3:30 pm - 4:30 pm		Billy Baxter	65.00	
Richard	2010-06-23	3:30 pm - 4:30 pm		Billy Baxter	65.00	
Richard	2010-06-30	3:30 pm - 4:30 pm		Billy Baxter	65.00	260.00
Terri	2010-05-26	2:00 pm - 3:00 pm		Timothy Martin	75.00	
Terri	2010-06-08	12:00 pm - 4:00 pm		Sally Walker	300.00	
Terri	2010-06-15	2:00 pm - 4:00 pm		Sally Walker	150.00	
Terri	2010-06-17	1:30 pm - 3:00 pm		Noreen Adamson	113.00	
Terri	2010-06-22	2:00 pm - 4:00 pm		Sally Walker	150.00	
Terri	2010-06-24	10:00 am - 12:00 pm		Noreen Adamson	150.00	
Terri	2010-06-24	3:00 pm - 4:00 pm		Billy Baxter	75.00	
Terri	2010-06-29	2:00 pm - 4:00 pm		Sally Walker	150.00	1163.00

SETUP & MAINTENANCE PANEL



This panel allows you to change some settings that control how Scheduler works and contains procedures to keep everything up to date and functioning correctly.

(a) Instructors List – for setting up your instructors and their pay rates.

(b) Time Periods – for establishing the length of the work day and the time interval you want shown on the Day Sheets.

(c) Tax Rate – the percentage added onto fees as a tax.

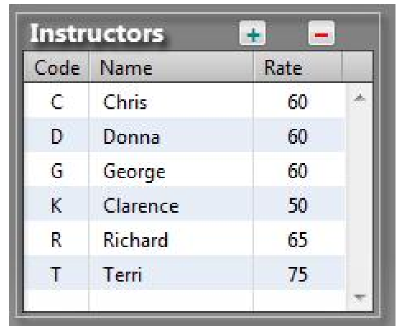
(d) Update Check – click this button to see if there is a newer version of Scheduler available for download.

(e) About Scheduler – the copyright, registration and End User License Agreement.

(f) Backup & Restore – routines to back up and restore the Scheduler database.

(g) Purge Old Data – routines to delete (and optionally archive) old data. Please read the note on this topic <u>very carefully</u> before proceeding (page 20).

■ Instructors List



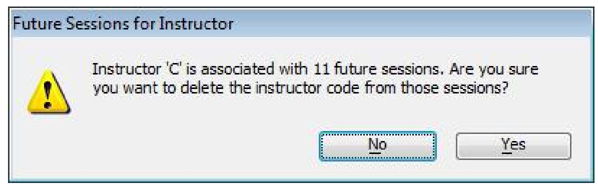
Each of your instructors must be added to this list. (Note that while you can have as many instructors as you want, only six can be displayed on the Day Sheet for any particular day. This is sufficient for the vast majority of tutoring situations but if it presents a problem for you, send a request to scheduler@ecion.ca.

Adding an Instructor

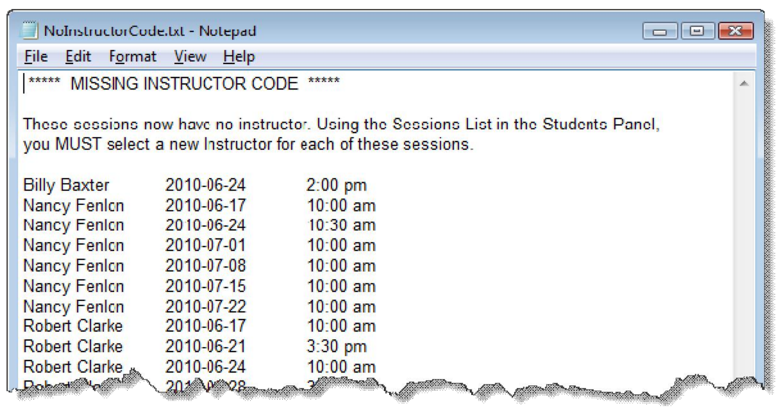
To add an instructor, click the small green plus sign at the top of the list to insert a new blank row. Enter a one-character code to identify the instructor, a short name and an hourly fee. Most often all fees will be the same but it is possible to vary them if necessary. Keep the name short since it needs to fit at the top of a column on the Day Sheet. The next time you open the Setup Panel, the instructors will be shown in alphabetical order by instructor code.

Deleting an Instructor

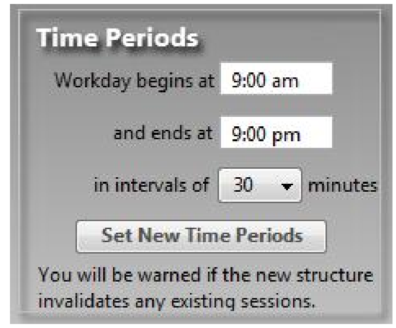
To delete an instructor, first click on the instructor's line and then click the small red minus sign button at the top of the list. If there are future sessions scheduled with that instructor, a message similar to the one shown here will appear for your confirmation.



If you confirm the deletion, Notepad will open with a list of the future sessions that now have no instructor code; they are listed in order by student and date. You must now schedule a new instructor for each of the listed sessions. This is easily done in the Students Panel. Simply select a student from the list, find the particular session in the Session List and modify the instructor column.



■ TIME PERIODS



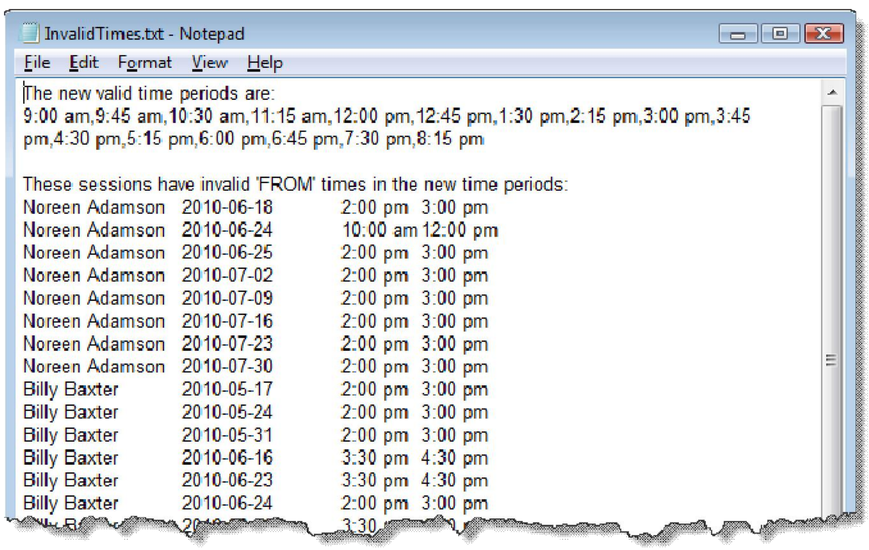
First set the length of your workday by typing times into the **begins at** and **ends at** boxes. It is <u>important</u> that the format for these times is correct – the hour, colon, minutes, space and "am" or "pm". For example, if you work 9 to 5, the times would be entered as **9:00 am** and **5:00 pm**.

From the **intervals** list, select the time periods to be used on your Day Sheets. Setting an interval of 30 minutes, would let you have tutoring session durations of half-hour, hour, hour-and-one-half, and so on. An interval of 10 minutes would fit pretty much any duration – 20 minutes, 40, 60, and so on.

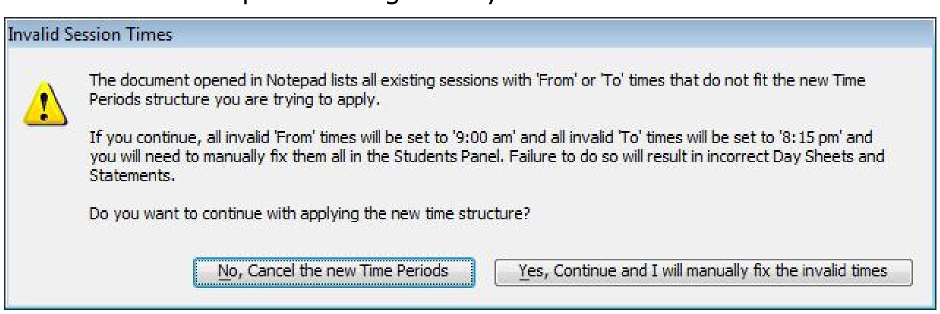
It is best to make the correct decisions for day length and time interval *before* scheduling sessions. But if you need to make a later change, make the new settings and click the **Set New Time Periods** button. Scheduler will check all existing sessions to ensure their durations will fit into the new structure.

If there are sessions that cannot fit (for example, a session that starts at 10:00 am does not fit into a day that starts at 9:00 am with 45 minute intervals), two windows will open.

- Notepad opens with a list of all sessions that cannot be placed into the new structure. It also shows the valid session starting times.



- A confirmation window opens asking what you want to do.

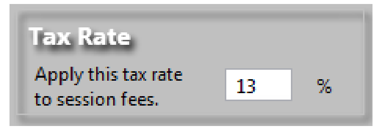


The problem is that all of the sessions in the Notepad list must be changed to make them fit into the new time structure. Your choices are either to cancel the change or to manually go through each session in the list and change its start/end times. This can be easily done in the Student Panel but still is a manual procedure.

And that's why it is much better to make the right decisions <u>*before*</u> entering any sessions!

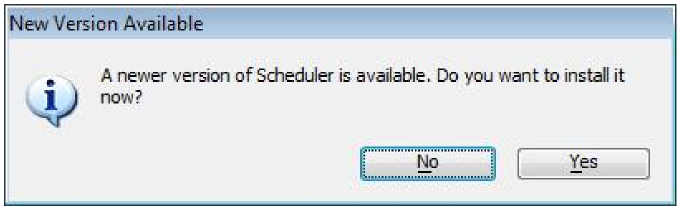
■ Tax Rate

This section is pretty obvious. If you need to add taxes to the session fee, enter the tax percentage rate into the tax rate box. The rate will be used when creating statements for the payors (page 12).



■ Update Check

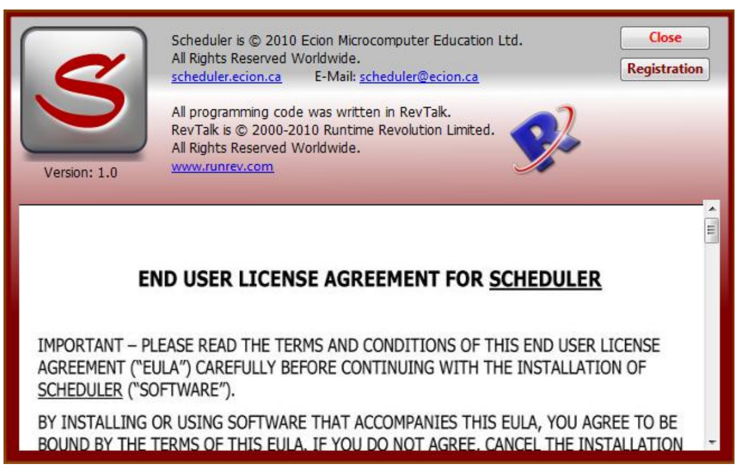
Click the **Check for Update** button to see if a new version of Scheduler is available (you must be connected to the Internet to do this check). If there is a new version, this message is displayed:



If you decide to do the update, the current version of Scheduler will be saved (with its version number appended to the name) and the new version is downloaded and installed. Both of these files can be found in the **SchedulerData** folder (see page 22 for more details on folder organization).

■ About Scheduler

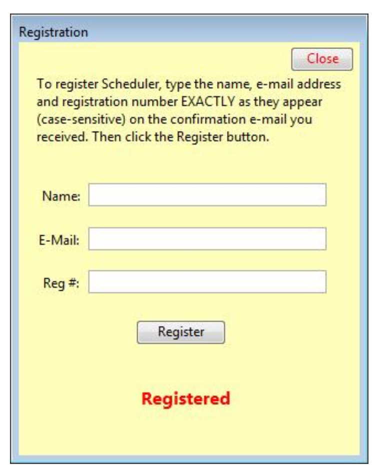
The **About Scheduler** button opens a window showing the copyright and registration information. In addition, the End User Licensing Agreement (EULA) can be read here.



Registration

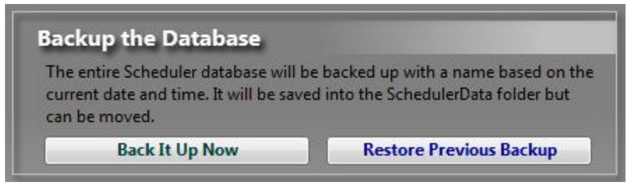
When you purchase Scheduler (scheduler.ecion.ca), you will receive an email containing your registration information. Return to this screen, click the **Registration** button and enter your name, e-mail address and registration code into the Registration dialogue. You must be sure to enter this information exactly as it appears in the e-mail. Once registered, any restrictions on the trial version are lifted.

For ideas on what to do next, see the "How Do I Get Started" note on page 24.

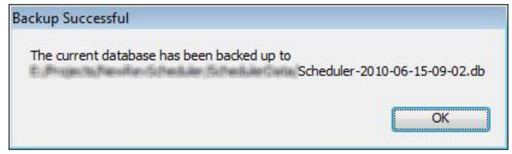


■ Backup & Restore

The data from any program that plays an important part in your business should be backed up periodically to guard against calamities. In Scheduler, all of your data is held in an SQLite database cleverly named Scheduler.db and stored in the **SchedulerData** folder (see page 22). Backing up this file is good insurance should something terrible happen.

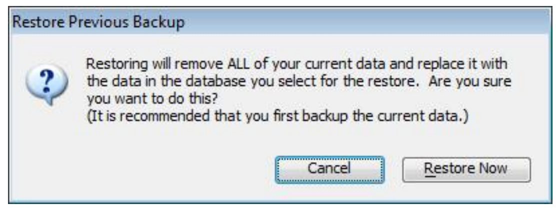


Performing the backup is simple and literally takes only a very few seconds. Click the **Back It Up Now** button and the current database file is copied to a second database with the date and time appended to its name.



A message box similar to the one shown here will appear verifying that the backup has been completed and showing you the path and name to the backup.

Should it become necessary, restoring a backup file just as simple. Note that restoring means all of your current data will be replaced by the data in the backup file you select. For this reason, you may want to first do a backup of your current data.

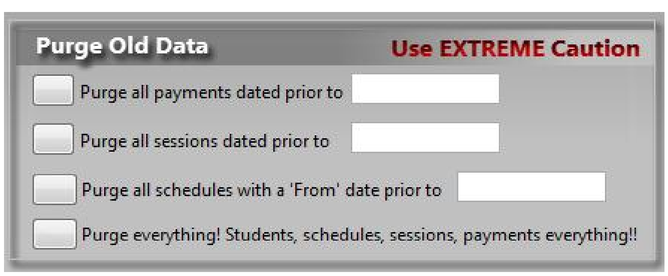


Click the **Restore Previous Backup** button and agree to the restore procedure in the confirmation message box that opens. The files in your **SchedulerData** folder will then be displayed for you to select the one you wish to restore.

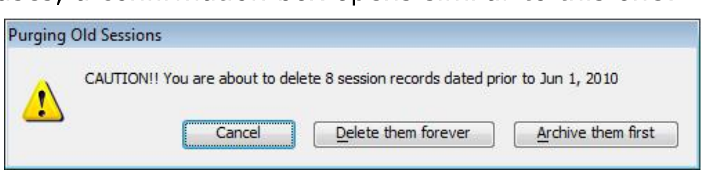
NOTE that the backup routine only backs up the crucial database file. For additional security, it is a good idea to peridoically save the entire Scheduler folder including all of its subfolders to an external hard drive or data key. In this way, you always have a backup of the whole application in case something happens to your main computer.

■ Purge Old Data

You absolutely and definitely want to **do a backup before you do any purging**!! The purge section is only used if you want to permanently delete old data that is no longer required; such as last year's schedules and sessions.



The purge procedure is quite simple. You are able to purge payments, sessions and schedules by entering a purge date into the date box and clicking the corresponding button. In each of these cases, a confirmation box opens similar to this one:



Notice that there is an option to archive the records before purging them if you wish to do so. But doing something with the archived data is currently left to the user and requires some knowledge of working with SQLite databases. Be especially careful with the fourth purge button – it deletes everything in the database so that you would be starting over from scratch.

Help Panel

The Help Panel presents the User Guide you are reading now as pages built right into Scheduler. This can be useful for a quick refresher on a particular topic.

The page numbers and topic titles are listed in the left column. Click on an item and that page will be displayed.

There is also an **Open as PDF** link in the top-right corner to open the User Guide as a PDF file for viewing or printing. You will need Adobe Acrobat Reader (www.adobe.com) or some similar PDF reader software to view this version of the guide. Virtually all computers already have this software installed or free versions are available on the web.

APPENDICES

■ INSTALLATION

Installation of the Scheduler application is quite straightforward. There are no Registry settings or system configurations or cookies or any other "hidden" components – everything is contained in a single folder and its subfolders. To install:

1. Download the Scheduler setup file from the "Download" page at scheduler.ecion.ca and save it (SchedulerSetup.exe) on your hard drive – remember where it is saved!
2. Double-click the downloaded file and follow the instructions to install the program. At the prompt for where to save it you could choose your desktop or any other convenient place (e.g., in the Documents folder) where you have write access. A shortcut button can be added to your desktop.

   One advantage to installing Scheduler in your Documents folder is that all of the Scheduler data will be backed up each time you backup your Documents folder. You *do* backup your business data and documents, right?

■ FOLDER ORGANIZATION

The entire application is contained inside a folder named **Scheduler**. This folder's name can be changed and it can be placed inside other folders but the subfolders it contains must keep their original names. Inside the Scheduler folder is the file named **Scheduler.exe**, the executable file that starts the whole program and an uninstall program. It is a good idea to put a shortcut to the Scheduler.exe file onto your desktop (an option during install).

There are three subfolders inside the main folder:

- **SchedulerData** – this folder contains the **Scheduler.db** SQLite database.

  Each time you create a backup (page 20), it will also be stored in this same folder. Backup files are named "Scheduler" followed by the date and time the backup was created. For example, **Scheduler-2010-06-12-08-32.db** would be a backup created at 8:32 on June 12, 2010. This naming strategy ensures that all backups have unique names but you are free to rename backup files any way you wish.

  When statements and receipts are created (page 12), they are also stored in this folder. The first time you run statements, a **Statements** folder is created. The statements are then placed in a subfolder with a name based on the time period covered in those statements – so a folder named **2010-05-01to2010-05-31** holds all statements generated for the period from May 1, 2010 to May 31, 2010. Inside these subfolders are the payor statements (Word RTF files). There is nothing wrong with running statements more than once for the same period – existing statements in the folder belonging to that period will be replaced with the new ones.

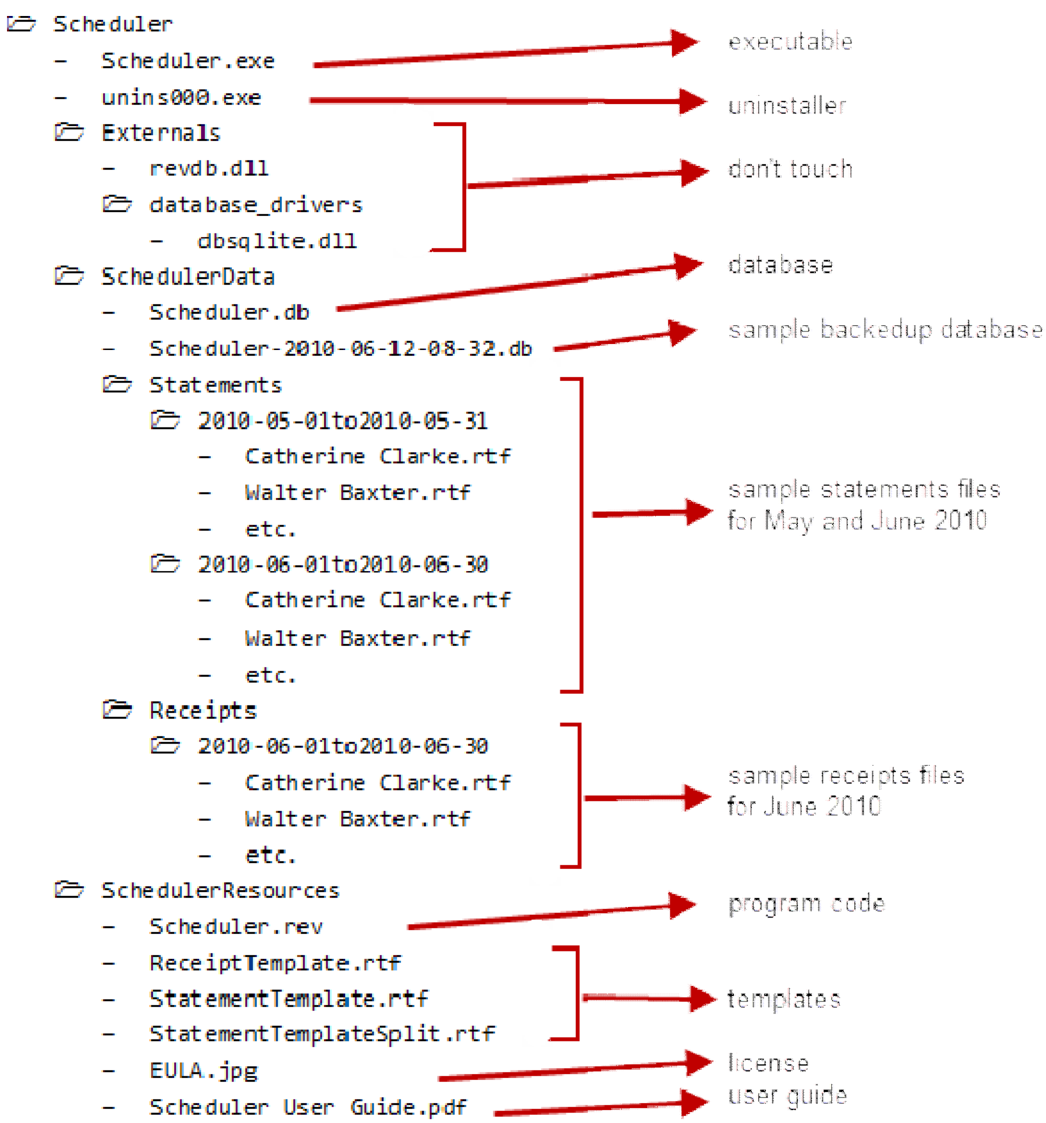
  Receipts work in the same way. The first time you run receipts, a **Receipts** folder is created. It contains subfolders for each time period specified when you ran the receipts and those subfolders hold the payor receipt documents.

- **SchedulerResources** – this folder contains a code file (**Scheduler.rev**), license and EULA files, and the three template files for creating statements and receipts – **StatementTemplate.rtf**, **StatementTemplateSplit.rtf** and **ReceiptTemplate.rtf**. See page 12 for more information about the templates. Temporary data files created by Scheduler are also placed in this folder.

  In addition, any time you update the Scheduler application (page 19), the previous version will be stored in this folder.

- **Externals** – this folder contains other programs required by Scheduler. Don't touch!

So after running Scheduler for awhile, the general layout of the folders would be similar to this diagram:



■ HOW DO I GET STARTED?

So you've played around with the sample data and now you are ready to work with your own *real* students and sessions. Here is a basic strategy for getting started:

1. First you will need to purchase a license at scheduler.ecion.ca after which you will receive an e-mail with your registration information.
2. Start up Scheduler, open the Setup panel, click the Registration button and enter your registration information exactly as shown in the e-mail (case-sensitive) – copy/pasting the registration code may be simpler than typing it yourself.
3. When you click the Register button, the word "Registered" will appear on the screen and the main title bar will show the registration name and date. Close the registration window.
4. You now will want to erase all of the trial version data. Still in the Setup Panel:
    a. Click the fourth Purge button to purge everything; you do <u>not</u> want to archive this test data.
    b. In the Instructors area, add each of your instructors. Remember that the code should be a single character. (Page 17)
    c. Set up the Time Periods area based on your work day. Give careful thought to the best time interval setting – base it on the possible starting times and lengths of your tutoring sessions. (Page 18)
    d. Set the appropriate tax rate.
    e. Close the Setup Panel and you will see the current day's (empty) Day Sheet displayed using the specified time intervals.
5. Next you will want to set up your students; they don't all have to be done at once – maybe start with the students you will be seeing next week. Open the Students Panel (page 3):
    a. Click the Add New Student button and enter the contact information for the student and the payor.
    b. If there is already an amount due from the payor, enter it in the Statement Balance field of the payor's tab.
    c. Click the Save New Student button.
    d. Consider how to enter the upcoming tutoring sessions for this student. If there are only a couple of sessions, you could enter them directly into the Sessions List of the Students Panel (page 5). But if there are a number of recurring sessions, it would be best to wait and do them later in the Schedules Panel.
    e. Repeat steps a through d for each student and then close the Students Panel.
6. Now would be a good time to set up some schedules; remember these are for generating a series of recurring sessions. Open the Schedules Panel (page 7):
    a. Click the Add New Schedule button and select a student and instructor.
    b. Enter the range of dates through which this schedule is to occur.
    c. Set the day(s), time(s) and fee(s) for the sessions that are to take place each week.
    d. Click the Save Changes button.
    e. Repeat steps a to d for each schedule and then Close the Schedules Panel.
    f. You should now be seeing the Day Sheets filled in appropriately for each day you click in the calendar.

7. Before you prepare any statements or receipts, you will want to modify the templates (page 12).
    a. In Windows Explorer, open the SchedulerResources folder.
    b. Double-click the StatementTemplate.rtf file and it will open in Word.
    c. Change the “Biff Bart” company information to your own.
    d. Replace the logo with your company logo or some suitable graphic (or delete it entirely).
    e. Save the file again as an rtf file.
    f. Repeat steps a through e for the StatementTemplateSplit.rtf and the ReceiptTemplate.rtf files.
8. You might want to do a backup (page 20) of this original information.

If you have any questions or need assistance with any of these steps, please sent an e-mail with the details to scheduler@ecion.ca and help will be on its way!